

February 12, 2009

TO: Tess Millar, Employee Relations Specialist  
Washington Public Employees Association (WPEA)

FROM: Teresa Parsons  
Director's Review Program Supervisor

SUBJECT: Randall Donner v. Military Department (MIL)  
Allocation Review Request ALLO-08-016

On February 5, 2009, I conducted a Director's review conference at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of Randall Donner's position. Present at the Director's review conference were you and Mr. Donner; Jana Dutt, Human Resources Consultant, representing the Military Department; Laura Drybread, Human Resources Director; and Mark McElroy, Assistant Director, also with the Military Department.

### **Director's Determination**

This position review was based on the work performed for the six-month period prior to December 11, 2007, the date Mr. Donner submitted his Position Review Request (PRR) to the Military Department's Human Resource Office. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of Mr. Donner's assigned duties and responsibilities, I conclude his position is properly allocated to the Maintenance Mechanic 2 classification.

### **Background**

In 2003, Mr. Donner submitted a Classification Questionnaire (CQ) to MIL's Human Resource (HR) Office requesting a reallocation of his position #0061 (Exhibit B-3). At that time, Mr. Donner's position had been allocated as a Plant Mechanic. On September 23, 2003, MIL's HR Office notified him his position was properly allocated. The Maintenance Mechanic 2 (MM 2) classification subsequently replaced the Plant Mechanic as part of the Department of Personnel's class consolidation in January 2006. On December 11, 2007, Mr. Donner submitted a PRR requesting reallocation to the Maintenance Mechanic 3 (MM 3) classification. On February 14, 2008, Ms. Dutt issued an allocation decision indicating that his position was properly allocated as a Maintenance Mechanic 2. Specifically, Ms. Dutt determined the duties had not substantially changed since the 2003 position review and that the majority of Mr.

Donner's assigned duties involved performing multi-skilled, journey level work in building and construction trades.

On March 4, 2008, you filed a request for a Director's review of MIL's allocation determination on behalf of Mr. Donner.

### **Summary of Mr. Donner's Perspective**

Mr. Donner asserts he is performing work at the MM 3 level. In particular, Mr. Donner believes his work relating to troubleshooting problems and developing cost estimates for necessary repairs fits the MM 3 class. In addition, Mr. Donner states that he adheres to safety regulations and is aware of his own safety as well as any co-workers who may be working with him on a job. Mr. Donner states that he organizes his own work and in most cases is the only maintenance employee handling the work for his assigned area (the Olympia and Montesano armories). If a job requires more than one individual, Mr. Donner indicates that he coordinates the work with another MM 2 from a different location and then directs the work in terms of how he wants to accomplish the job. Mr. Donner believes the level of work he performs reaches the senior/specialist or lead because he essentially assigns his own work and determines how the work will be accomplished. Mr. Donner asserts he only needs his supervisor's approval for major repairs, such as a roofing problem, that are costly and outside the scope of his work. Mr. Donner believes the MM 3 is the correct classification for his position.

### **Summary of MIL's Reasoning**

MIL acknowledges Mr. Donner is a good employee who performs skilled work. MIL also recognizes Mr. Donner has a high skill level regarding electrical work and that he is licensed for residential work. However, MIL asserts the level of work assigned to his position falls within the scope of the MM 2 classification. MIL states that Mr. Donner performs a broad and diverse set of maintenance functions that include skilled work but not work at a specialist level. MIL agrees that Mr. Donner may perform a few higher level duties but contends the primary purpose of his position is to perform general maintenance at a journey level for the buildings and grounds of the Olympia and Montesano armories. In addition, MIL asserts the structure of the Military Department does not require MM 3 positions at a specialist level. Instead, MIL states that each region has MM 2 positions, similar to Mr. Donner's, assigned to specific armories within the region. MIL believes the MM 2 is the appropriate classification for Mr. Donner's position.

### **Rationale for Director's Determination**

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

During the Director's review conference, Mr. Donner agreed he is performing the same work he performed at the time of the last position review in 2003. My review of the previous CQ and the PRR for this position review finds the duties and responsibilities to be very similar. The

position's purpose, as identified on the PRR (Exhibit B-1), states that his position exists to perform duties that include:

- Maintaining the utilities, buildings, and grounds at the armories in the South Region;
- Maintenance work includes: plumbing, electrical, heating, boilers, generators, and valves;
- Maintenance of lighting, cooking equipment, doors, roofs, and windows.
- Responsibility for painting interior and exterior surfaces.

In the Job Duties section of the PRR, Mr. Donner has indicated that he inspects and performs maintenance on the buildings and grounds, including grounds equipment, lighting, plumbing fixtures, mechanical equipment, doors and locks. Approximately 20% of Mr. Donner's assigned work includes skilled electrical alterations and installations. During the Director's review conference, Mr. Donner gave some examples of electrical work that included replacing circuits for equipment such as motion sensors, replacing circuit breakers, replacing or installing electrical panel, determining the size and cost of conduit needed, pulling wires, and installing outlets. Mr. Donner also stated that he maintains, installs, and repairs electrical lighting and ballasts and heating/cooling equipment and systems. Mr. Donner stated that he performs most electrical repairs and an electrician is rarely required unless installing electrical panels for new construction. Mr. Donner also stated that licensed electrical work is not required for his position.

Mr. Donner also gave examples of plumbing maintenance and repairs, which included flush valves, leaking toilets or faucets, leaks in any water lines, pumps, or boilers. Mr. Donner may replace valves, troubleshoot boilers used for heating and hot water, and dismantle and reassemble the boiler if necessary. Mr. Donner also performs preventive maintenance on water heaters, pumps, compressors, exhaust fans, and the filters associated with them. Mr. Donner indicated that his work on these items involves replacing filters and belts and that an employee specialized in HVAC will handle more involved repairs. Mr. Donner also pointed out that he reads blueprints to determine where electrical lines are located and gave an example of locating a manhole cover for the septic system in Montesano. He indicated he needed to locate and remove the cover but that a septic company would actually pump the system.

Mr. Donner's supervisor at the time of this request was John Gadley, Construction Maintenance Superintendent 2. In the Supervisor Review Section of the PRR, Mr. Gadley indicated that he agreed with the assessment of duties on the PRR. Mr. Gadley also indicated that Mr. Donner required little supervision and that Mr. Donner determined and purchased the material needed for a work order. Mr. Gadley also wrote, "only in specific cases does [Mr. Donner] need help or advice to complete [work orders]" (Exhibit B-1, page 7). Mr. Gadley's supervisor, John Lindstrom, Facilities Operations and Maintenance Manager, disagreed with the characterization of duties on the PRR. During the Director's review, Mr. Lindstrom's supervisor, Assistant Director Mark McElroy, and Ms. Dutt explained that Mr. Gadley was in an acting position at the time he supervised Mr. Donner and therefore, the agency also relied on input from Mr. Lindstrom. In response to the PRR, Mr. Lindstrom provided copies of time card information showing the work performed by Mr. Donner (Exhibits A-3 & B-2 (Enclosure 2)). The time records directly correspond with work orders completed by Mr. Donner. Mr. Donner explained that a work order is tied to every task or job he completes, and he provided an illustration of the work order, though it represents a different time period (Exhibit C).

As part of her review, Ms. Dutt discussed the time card reports with Mr. Lindstrom. She then summarized the time card data by the code describing the type of work and the number of hours and percentage of time spent performing the work for calendar year 2007 (Exhibit B-2, enclosure 2). Work orders may be prompted by the building manager or others requesting a specific action, including Mr. Donner. Based on the type of request, the individual in charge of production control at Camp Murray (Bill Price) will assign a code and send the work order to the appropriate Construction Maintenance Superintendent 2 (Mr. Donner's supervisor). Mr. Donner's supervisor may then assign the work order to one of the MM 2 positions. Mr. Donner also indicated that he and the other MM 2s will usually look up the work orders in the computer system. If a work order pertains to an individual's area of responsibility, that individual will typically take the order and complete the work. Part of completing the work order includes determining the materials needed and purchasing the materials using a credit card. Mr. Donner indicated he has a credit limit of roughly \$5,000 for one year, and he monitors the amount he spends to perform maintenance and repairs. Like the other MM 2s assigned to different regions, Mr. Donner enters the cost information for tracking purposes. Mr. Donner's supervisor then reviews and closes every work order.

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by definition and distinguishing characteristics are primary considerations.

The class series concept for Maintenance Mechanic positions includes performance of the following:

. . . general maintenance, repair, remodeling and construction duties utilizing working knowledge of several related skill fields such as electrical, plumbing, carpentry, welding, painting and machinist work. Incumbents inspect, repair, install and maintain physical facilities, locks and maintain and repair machinery and equipment. . . .

The **MM 3 definition** is the *senior, specialist or leadworker level of the series. Positions at this level perform skilled work in more than one trade or craft. Incumbents typically specialize in one trade or craft but perform journey-level and semi-skilled work in a variety of disciplines. Incumbents perform construction, maintenance, repair and modification of buildings, facilities, mechanical equipment, machinery and specific apparatus and utilize a working knowledge of several related skill fields such as plumbing, electrical, welding, carpentry, and machinist work.*

The Department of Personnel's Glossary of Classification Terms defines the following terms: <http://www.dop.wa.gov/HRProfessionals/Classification/>.

**Specialist** –Duties involve intensive application of knowledge and skills in a specific segment of an occupational area.

**Lead** – An employee who performs the same or similar duties as other employees in his/her work group and has the designated responsibility to regularly assign, instruct, and check the work of those employees.

Mr. Donner has not been assigned specialist level work in a specific occupational area. Rather, he has been assigned a range of duties and responsibilities to maintain the utilities, grounds, and buildings at the armories in the South Region. Further, Mr. Donner has not been assigned lead responsibility consistent with the definition. While Mr. Donner may occasionally direct the work of other MM 2 positions working on jobs in his region when the work requires more than one MM 2, he does not regularly assign, instruct, and check the work of other employees.

The **MM 2 definition** is the *journey, working or occupational level of the series. Positions at this level perform a variety of skilled work in the operation, maintenance, repair, remodeling and construction of buildings, grounds, machinery, mechanical facilities and equipment, and hospital facilities, systems and equipment. Incumbents work independently and utilize a general knowledge of several related skill fields such as plumbing, electrical, welding, carpentry, and machinist work.*

The Department of Personnel's Glossary of Classification Terms defines **journey-level** as:

Fully competent and qualified in all aspects of a body of work and given broad/general guidance, can complete work assignments to standard under minimal supervision. Also referred to as the *working or fully qualified* occupational level.

When comparing the totality of Mr. Donner's assigned duties and responsibilities to the job classifications, the MM 2 class provides a better fit. While Mr. Donner may have some specialized knowledge in the electrical field and may perform some higher-level duties, the majority of work assigned to his position requires a general knowledge and application in several related skill fields. The work assigned to his position encompasses a variety of work ranging from grounds keeping to repair and maintenance of the facility. The maintenance includes a variety of work consistent with the journey level for repairs related to plumbing, electrical, and carpentry. While I realize these trades are also encompassed in the MM 3 classification, the work at the MM 3 level typically involves a more intense application of knowledge and skills in one specialty area, while performing skilled work in a variety of areas. In addition, the level of maintenance work often extends beyond the journey level. In order to gain a better understanding of journey level work in each trade area, I also reviewed the Electrician (class code 608F) and the Plumber/Pipefitter/Steamfitter (class code 621F) classes, also journey level (Exhibit E).

While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification. The majority of work assigned to Mr. Donner's position is at the journey level. The typical work identified in the MM 2 class specification most in line with Mr. Donner's assignments includes:

- Performs preventative maintenance and repairs on all types of mechanical equipment . . .
- Performs maintenance, operation and repair of electrical, mechanical and structural systems of buildings and utility distribution;
- Monitor safety, fire protection and environmental control equipment to ensure the building systems and equipment are operating in a satisfactory condition; respond to

service request and secure necessary assistance; take preventative and emergency action to control malfunctions;

- Operates hand tools, power tools and other shop equipment; fabricates materials and equipment;
- Installs, maintains, and repairs electrical connections, switches, circuits, electrical equipment, and thermostats, and valves;
- Remodels and constructs facilities in accordance with project requirements . . .;
- Repairs windows, doors, screens, floors, floor coverings, and painted surfaces.

The typical work performed by a journey level electrician or plumber, as identified in the class specifications, and similar to Mr. Donner's assigned work includes:

- Installs, modifies, maintains, and repairs interior wiring and cables, connections for electric machines, switches and controls, fuse boxes, breaker panels, distribution and instrument panels, buzzer and bell circuits, and hearing and power circuits;
- Installs, adjusts, maintains, modifies and repairs electric motors, equipment, and instruments such as pumps, clocks . . . stoves, timers, air conditioners, fans, metering devices, power tools, motors and generators, and refrigerators;
- Inspects electrical systems; checks wires, poles, and transformers and keeps lines cleared of tree limbs and brush;
- Performs alterations, adjustments, modifications, repairs and installations of electrical equipment systems. Estimates materials and time needed to complete jobs;
- Installs, maintains and repairs pipes, storm sewers, septic tanks, sewage mains and laterals, valves, drains, basins, tubs, faucets, lavatories, sinks, gates, hydrants, water coolers, and dishwashers;
- Inspects water mains, fixtures, sewer lines, valves, and septic tanks to determine need for maintenance and repair;
- Installs, inspects, maintains and repairs steam and heating systems and such equipment as boilers . . . pumps, traps, valves, and . . . kitchen equipment.

Because Mr. Donner's work involves a variety of journey level trades work, the MM 2 classification is a better fit than the specific trade classes of Electrician or Plumber/Pipefitter/Steamfitter.

In my review, I also considered the organizational structure of the Military Department (Exhibit B-4). Each region of the department has MM 2 positions assigned to specific armories. The majority of work assigned to the MM 2 positions involves preventive maintenance and repairs and general upkeep of the facilities and grounds. This also includes maintenance and repairs of equipment and tools used to maintain the facilities, repairs of the building structures, such as doors and windows, and skilled maintenance in electrical and plumbing work.

It is evident from the comments during the Director's review that Mr. Donner's work is highly valued in the department. A position's allocation, however, is not based on an evaluation of performance or an individual's ability to perform higher-level work. Rather, it is based on the majority of work assigned to a position. On a best fit basis, the work assigned to Mr. Donner's position best fits within the MM 2 classification.

### **Appeal Rights**

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board . . . . Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

c:     Randy Donner  
       Jana Dutt, MIL  
       Lisa Skriletz, DOP

Enclosure: List of Exhibits